

Pension Plan Service Retirement Checklist

Employee Name

PFID #

JRO

Termination Date

Service Retirement Forms Packet

Pension Plan Application for Service Retirement – FR-11

Pension Plan Option Selection – FRS-11o

Spousal Acknowledgment Form – SA-1

Proof of Birth Date – Applicant

Option 3 or 4 Selected?

Proof of Birth Date – Beneficiary

Option 3 Selected Naming Spouse as Joint-Annuitant?

Marriage Certificate

PARs

Submitted PAR to JAC – Reason Code 56 – Retirement

Submitted Annual Leave PAR to JAC, when applicable. *

**If the employee has elected to rollover all, or a portion of, their annual leave payout to their deferred compensation account, please make note of this in the comments section of the PAR.*

Notes: